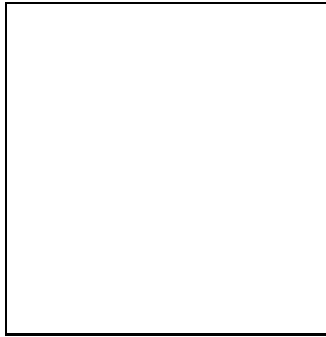


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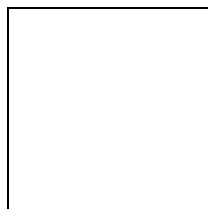


Welcome to **WARMRegards**, the only e-newsletter for public health and related professionals dedicated to the use of automated reminder messaging.

We report how other professionals are using technology to increase participation and improve the delivery of services. We report on new developments in technology, applications and federal, state and local issues. We report on real-world experiences regarding appointment reminders, EBT benefits and other applications. We highlight best practices and tips-of-the-trade, and report actual outcomes. A new issue will be sent not more frequently than once-per-month.

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Sending Clinic Reminders via SMS Text: What You Need to Know

PEW research (see Resources below) indicates:

- 83% of American adults own cell phones and three-quarters of them (73%) send and receive text messages
- 31% of text message users (age 18 or older) prefer texting to voice calls
- Young adults (age 18-24) stand out in their use of text messaging, they exchange 109.5 messages per day
- The younger the texter the more likely the preference to receive texts over voice calls

Adding automated reminder messaging via SMS text can increase the effectiveness of proactive communications with your participants. This issue of WarmREGARDS is the first of a two-part series covering what clinic directors need to know about implementing automated text messaging.

In this first part we cover the "Platform" issues regarding the different methods and technologies available for sending SMS text messages and the pros/cons of each.

The three vendor/technology options are: SMS via Direct Portal; SMS via SMTP(email); and SMS via Tethered Cell Phone. In the next issue we will cover "Scripting" issues regarding unique complexities of personalized, multi-lingual scripting for agencies such as WIC clinics as compared to the less sophisticated messaging typically used by medical offices.

Part 1 - Platforms: Methods and Technologies

In this issue we address:

- Opt-In Administration
- Personalized Text Messages
- Multi-Lingual Text Messages
- "For questions call..."
- SMS Text Replies
- Dynamic Caller-IDs
- Capacity and Reliability
- Vendor/Technology Options

Opt-In Administration

Opt-In handling is the most important issue regarding automated SMS text messaging.

As a government agency you are not subject to the telemarketing "do-not-call-lists" for voice reminder phone calls, so you can simply export the phone numbers of your participants from your database and call them. You generally don't even need to know if a phone number in your database is a cell phone or not. However, there are FCC regulations that prevent you from sending automated text messages to persons who have not given you authorization to do so, even if you are not a telemarketer. When one of your participants does give you permission to send them automated SMS text messages this is referred to as "opting in" (Opt-In).

This means that a method must be provided for your participants to Opt-In or Opt-Out of your text messaging service and records must be kept when they do so. Your options are to either handle this Opt-In administration yourself or you can select an SMS text messaging service vendor who offers participant "self-opt-in." To administer SMS text messaging Opt-In yourself you must provide your participants with a paper or electronic method of changing their Opt-In status and you must keep a database that keeps track of which phone numbers are cell phones and which ones have Opted-In.

Then, when you send automated SMS text messages you must exclude participants who have not Opted-In from your call lists.

If you select a vendor who provides participant "self-opt-in," then your participants can change their own Opt-In status by simply sending a text message from their cell phone to the vendor. In this case you will display an instruction to your participants something like...

We are pleased to announce our new phone and text message reminder service. If you wish to receive your reminders by TEXT please text the word ALERT to 22300 and you will be opted in for text notifications. Applicable charges according to your data plan will apply. Thank you.

Your vendor will keep track of who has Opted-In and who has not. You have nothing to keep track of. You don't even need to keep track of which phone numbers are cell phones. You simply send all the phone numbers you wish to send messages to and the vendor will send SMS text messages to those who have Opted-In and voice phone calls to those who have not. You should expect to pay a higher per-message price to a vendor who handles the Opt-In administration for you than to one who doesn't.

Note: If you select the primitive "SMS via SMTP gateway" solution technology then you will also have to keep track of which cell phone company each participant is currently using...an almost impossible task. This is discussed further below.

Personalized Text Messages

Consider appointment reminders for example. Ideally each message is personalized for the participant receiving it. You may have more than one type of appointment at your agency such as new participant, recertification, group education, etc.. The message script will be different for each appointment type. A full voice or

e-mail text message will typically give the type of appointment, the name and location of the clinic and/or practitioner, the date and time, what to bring, how to prepare, etc.. For voice phone calls and for e-mail text scripts your reminder scripts can be longer and contain a full set of personalized information.

Example voice phone call message:

Hello, this is the <<Clinic Name>> with an appointment reminder call. <<Client FirstName(s)>>has an appointment on <<Day of Week, Month & Day number>>at <<Appt Time.>> This appointment is for you or your child. If it's for your child, please bring them. Remember to bring proofs of ID, current address, and household income. To confirm this appointment press 1, if you need to reschedule press 2, if this is an incorrect number press 3, to repeat this message, press 9. To reschedule your appointment or if you have questions, please call the WIC office at <<Clinic phone number.>>Thank you.

When preparing SMS text scripts the character limit per message is much smaller so these scripts must be carefully prepared to pack only the essential information, including date/time, into a small amount of text.

Example SMS text message:

<<Clinic Name>> reminder<<Client FirstName(s)>>has an appt on <<Month & Day number>>at <<Appt Time.>>for recert. Questions call<<Clinic phone number.>>

All of the personalized information that will be inserted into a participant's message will come from your participants database along with their phone number. For this reason a detailed specification of the data to be exported and its formatting is a prerequisite before you will be able to design the various reminder message scripts. Depending on the automated messaging vendor's requirements, some sort of middle-processing

may be required to reformat the data either before or after it is transmitted to the vendor's platform. You will want to look for a vendor who has a highly disciplined process for sequencing the data interfacing, scripting, translation, verification and implementation. There may be a one-time fee for this part of the implementation.

Multi-Lingual Text Messages

Providing your text messages in multiple languages is important to increase the level of participation, increase the effectiveness of your message delivery and increase their perception of your level of service. Most cell phones can display text messages using non-latin foreign language characters, even Chinese symbols. However, not all SMS text sending methods support languages that use non-latin characters.

Also, the ability to correctly translate dynamic personalized text messages into multiple target languages is a difficult skill set for messaging vendors to master. You should check references from vendors demonstrating their ability to do this well.

"For Questions Call..."

Because a text message has to be brief, it is important to include a phone number to call with questions. See the example SMS text message above. This phone number could ring your clinic's incoming phone line, however the text messages may be going out during times when that line is not staffed. A more popular method is for your messaging vendor to provide a toll-free phone number where the participant can call to hear the longer and more detailed voice recording message, in their preferred language, the same they would have heard if they had received a voice call instead of a text message. See the example voice phone call message above.

SMS Text Replies

It is possible for an SMS text recipient to send a text reply. This may not be desirable from your perspective. You could have a participant indicate that they intend to keep an appointment by sending a text reply. Depending on the technology platform used, these replies would either come into a physical cell phone at the clinic for someone to read, or the replies information might be available on the job results report from the automated messaging system. Your staff could use this information to fill the time slots. Some messaging vendors who do not have adequate text message reporting capabilities promote taking text message replies as the method of getting your "report" on what happened. The negatives to taking replies are the "long-winded replies" and the "lost alternative."

An issue with text replies is that the participant can send a long, involved reply containing explanations, excuses and even questions. Real world experience with WIC agencies sending text messages show that there is no way to physically insure WIC moms only reply in the manner they are instructed. They tend to reply in book form...*"I will miss because my car is broke and my boyfriend has to work but he has next Wednesday off so I want to know if I can set an appointment then?"* Clinic staff does not want to have to read, handle and respond to all these replies.

The alternative is to instruct the participant to call your staff if they need to reschedule. This makes it less easy for the participant to cancel the appointment, keeps you in personal contact with the participant, keeps them actively engaged, gets them back on the schedule right away. This also gives your staff an opportunity to inform and educate the participant as to the importance of keeping appointments.

Accepting SMS text replies also increases the cost for both the agency and the participant. After consideration, the majority of agencies choose not to accept SMS text replies.

Dynamic Caller-IDs

All cell phone calls and text messages are identified and presented to the receiving party by the Caller-ID of the sending party. To maximize message delivery effectiveness it is important that your reminder text message be "from" the clinic that serves that particular participant. The participant will recognize the sender clinic and the importance of the message.

If an SMS text message sending resource serves more than one clinic then it is important that it be able to dynamically assign each clinic's Caller-ID when sending that clinic's reminder messages. Not all SMS message sending platform technologies can do this.

Capacity and Reliability

Capacity means how many phone calls and/or SMS text messages can be reliably delivered per-minute or per-hour. Most clinics operate on a daily cycle and it is important that the reminder messages be sent fast enough and the results be reported back in a timely, same-day manner so that the clinic staff knows what to expect the next morning. Some SMS text sending vendors and technologies start with "yesterday's" appointment calendar, not today's; some are slow to send out the text messages; some can have long lag times between the time sent and the time of delivery; and some don't get you the reports until the next day.

Reliability means that your messages are not lost in the system with delivery failures; the contents of your message are not garbled or truncated; the results of message delivery are accurately reported back; and redundant carrier resources are used so your messages go through even when there are network problems. It also means that your text messaging account as a "sender" and your volume of messaging traffic will not be flagged as a problem by the cell phone carrier and be "blocked" as a result.

The various technologies are discussed in more detail below with capacity and reliability varying significantly.

Vendor/Technology Options

There is more than one technology available for sending SMS text messages but one is preferred. We discuss the pros/cons of the following technologies:

- SMS via Direct Portal
- SMS via SMTP Gateway
- SMS via Tethered Cell Phone

SMS via Direct Portal

The cellular industry provides an industry standard specification for directly injecting text messages into the cellular network. This is the method the cell phone companies themselves use. It is also the method that companies in the text messaging portal business use. These companies have sufficient messaging volume to justify the costs involved with such a portal. The cell phone companies charge a per-message fee for handling a text message and the portal companies do likewise.

While there is a cost associated with sending SMS text messages using a Direct Portal, this is the preferred method. It is the most reliable, reaches 99.8% of the cell phones in the country and offers the highest capacity and delivery speed. You also do not need to know which cell carrier the participant uses. Most importantly, only a vendor using this method is likely to be able to offer you automatic participant self-opt-in administration so you don't have to keep track of it. (Discussed above.)

Less desirable are some messaging vendors, especially those who sell you on-site equipment, who require you to setup your own direct account with an SMS Portal company and you get two bills, one from the messaging vendor and one from the SMS Direct Portal company,

and the cost per message is high without huge volume.

SMS via SMTP Gateway

Each cellular provider company, AT&T, Verizon, Sprint, etc.. provides an "SMTP Gateway" where cell subscribers can receive text messages sent as e-mails. The sender must know the cell company's specific SMTP gateway e-mail address. The text of an e-mail message sent to a cell phone's phone number at ("@" the gateway e-mail address will be delivered as a text message to the cell phone. To use this method means you need to keep track of which cell company each of your participants uses so you know which SMTP gateway e-mail address to use. There is no per-message cost to send a text message this way, however there are two problems with it.

The first problem is that people change their cell phone companies frequently, and because they don't tell you it is extremely difficult to keep a database current. With the other methods you don't need to know which cell phone company a participant uses. The second problem is that if you send a larger quantity of messages this way the cell phone company may identify you as a "spammer" and block text messages you send through them.

This method can also have reliability problems with messages that fail to deliver or are delivered hours or even days after they are sent. This method only reaches about 80% of cell phone subscribers in the country.

SMS via Tethered Cell Phone

This option is only available to you if you purchase your own physical messaging server equipment. In this case an actual cell phone is tethered by a cable to the messaging server. This cell phone is usually setup with an unlimited text messaging plan with a local cell company. The server then uses this phone to send your text message reminders. This method can have reduced costs unless your cell phone company flags the high volume on your "unlimited" plan.

This method should only be used for a single small clinic since there is only one caller ID associated with the physical phone and it will be displayed for all messages sent through the phone. This method has no redundancy and reduced reliability with more single-points-of-failure, and it has less capacity and will take a lot longer to send your messages. Companies that promote this solution also usually expect you to read the text message replies as the method of getting your "report" of what happened.

Summary

Look for an outsourced automated messaging vendor who can deliver SMS text messages using redundant, direct SMS portals; who offers automated participant self-opt-in administration; who offers personalized text messages; who offers a "For Questions Call..." call-back toll-free phone number; who demonstrates correct translation into multiple target languages; who offers dynamic caller-IDs; who provides same-day reports without relying on text replies; and who has a highly disciplined process for sequencing the data interfacing, scripting, translation, verification and implementation.

While we are only discussing SMS text messaging in this article, your best option is an outsourced messaging services company that charges you a flat annual fee per-participant for unlimited voice phone call, SMS text and e-mail messaging.

Watch For Part Two Next Month...

We will cover "Scripting" issues regarding unique complexities of personalized, multi-lingual scripting for agencies such as WIC clinics as compared to the less sophisticated reminder messaging typically used by medical offices.

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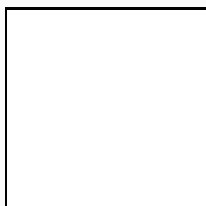
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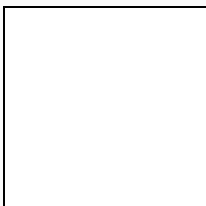
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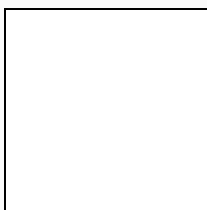
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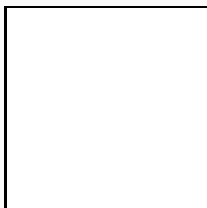
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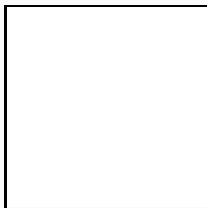
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